

USPTO PATENT FULL-TEXT AND IMAGE DATABASE

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Searching 1976 to present...

Results of Search in 1976 to present db for:

(((((CCL/705/\$ AND "financial advisor") AND portfolio) AND suggest\$) AND chang\$) AND evaluat\$): 6 patents.

Hits 1 through 6 out of 6

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PAT. NO.	Title
1 6,370,516	Computer based device to report the results of codified methodologies of financial advisors applied to a single security or element
2 6,349,290	Automated system and method for customized and personalized presentation of products and services of a financial institution
3 6,240,399	System and method for optimizing investment location
4 6,064,986	Computer assisted and/or implemented process and architecture for customer account creation, maintenance and administration for an investment and/or retirement program
5 6,021,397	Financial advisory system
6 5,918,217	User interface for a financial advisory system

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